

**PROCESSING PROCEDURES TO OBTAIN APPROVAL TO AWARD A&E
SOLE SOURCE CONSULTANT CONTRACTS **NOT** REQUIRING COUNCIL
APPROVAL**

Follow these steps in the order listed below to process a Sole Source Approval request valued from \$25,000–\$250,000 for Non–CIP Funded Contracts or from \$25,000–\$1M for CIP Funded Contracts (i.e. for A&E Consultant contracts awarding via an **e1544** or **ePA2625**):

Note: For Sole Source Approvals requiring Council Approval – Go to Page 2 of this document.

1. Project Manager or Initiator (PM) contacts the Consultant Services Coordinator (CSC) in Public Works Contracts (PWC) to request a contract number be assigned to the Sole Source request and for the A&E Project Request Form.
2. PM drafts Sole Source Memo request addressed to PWC's Deputy Director from the PM's Deputy Director including the following:
 - a. Desired Consultant
 - b. Value
 - c. Duration
 - d. Justification/reason for Sole Source referencing the contract number
 - e. List explanation/statement as to why, per SDMC §22.3016, you are certifying that a sole source agreement is necessary, and that a strict compliance with a competitive process would be unavailing or would not produce an advantage, and soliciting bids or proposals would be undesirable, impractical or impossible.
3. PM sends draft Sole Source Memo request in Word format to PWC's Principal Contract Specialist, for review and approval to route for signature.
4. Once approved, PM routes Sole Source Memo request to their Deputy Director for signature.
5. Deputy Director or designee sends the signed Sole Source Memo request to PWC's Deputy Director to process for approval.
6. Once Sole Source Memo is approved by the Public Works Director, PWC distributes approved Sole Source Memo to the cc list.
7. PM submits the following **REQUIRED** items to CSC to obtain boiler agreement for Sole Source:
 - a. Completed A&E Project Request Form
 - b. Scope of Services
 - c. Approved HR Form
 - d. Approved Sole Source Memo
8. CSC provides PM the boiler and Processing Procedures to Award Sole Source Contracts Not Requiring Council Approval.

NOTE: Emergency Sole Source requests require City Engineer approval before a boiler can be released.

**PROCESSING PROCEDURES TO OBTAIN APPROVAL TO AWARD A&E
SOLE SOURCE CONSULTANT CONTRACTS **REQUIRING COUNCIL**
APPROVAL**

Follow these steps in the order listed below to process a Sole Source Approval request valued over \$250,000 for Non-CIP Funded Contracts or over \$1M for CIP Funded Contracts (i.e. for A&E Consultant contracts awarding via an **e1472** requiring Council Resolution or Ordinance):

NEW streamlining procedure –Project Manager or Initiator (PM) must include Sole Source justification (Items 2. a & b below) in the e1472 and in the Resolution/Ordinance to request authorization from Council to approve the Sole Source action.

1. PM contacts the Consultant Services Coordinator (CSC) in PWC to request a contract number be assigned to the Sole Source request and for the A&E Project Request Form.
2. PM provides draft e-mail Statement from PM's Deputy Director that this will be a Sole Source contract requiring Council Approval to PWC's Principal Contract Specialist for review and approval prior to proceeding to step 3. The e-mail statement must include all of the following elements:
 - a. The justification/reason for the Sole Source referencing the contract number
 - b. Explanation/statement as to why, per SDMC §22.3016, a sole source agreement is necessary and that strict compliance with a competitive process would be unavailing or would not produce an advantage, and soliciting bids or proposals would be undesirable, impractical or impossible.
 - c. A confirmation statement that the information mentioned in Items a & b above will be included in the e1472 and Resolution/Ordinance requesting Council to approve the Sole Source action.
3. PM submits the following **REQUIRED** items to CSC to obtain boiler agreement for Sole Source:
 - a. Completed A&E Project Request Form
 - b. Scope of Services
 - c. Approved HR Form
 - d. PWC Approval of Deputy Director e-mail statement (Item 2 above)
4. CSC provides PM a contract boiler and Processing Procedures to Award Sole Source Contracts Requiring Council Approval.

NOTE: Emergency Sole Source requests require City Engineer approval before a boiler can be released.